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# **“Mr. Watson—Come here—I Want to See You”: Upgrading Your Tech Support Communications**

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## **Abstract**

Resolving access and functionality issues for online resources often can strain even the calmest of nerves by combining impatient patrons with very precise technical details and communication lines extending from those patrons through the library to external technical support personnel outside of the institution. Clear, concise workplace communications are an ideal that is almost impossible to accomplish 100% of the time. While not always achievable, the resolution of technical issues certainly provides instances where the importance of communicating efficiently and effectively is greatly amplified. We will explore how both library personnel and vendors can work together to improve communications with each other and reduce tension when technical issues arise. Topics will include steps for improving communication results, methods of constructing statements specifically addressed to different stakeholders, and approaches to turn conversations from combative to collaborative. Vendor and librarian viewpoints will be shared.

## **Begin as You Wish to Continue**

Often by the time a librarian is alerted to a technical problem, there are already quite a few people who have been frustrated and annoyed by the situation. Tensions can run high, and it can be quite easy to mirror this tension, bringing it forward to influence the steps taken to resolve the problem. However, at this point in the search for a solution, the librarian has an opportunity to pause, take a breath, and decrease the level of agitation before proceeding.

It is important to adopt a communications approach that encourages cooperation and problem solving. One way to accomplish this is by focusing on the issues at hand and avoiding assigning blame or revisiting past situations. There will be plenty of time after the current problem is resolved for librarians and the vendor to review overall service quality and discuss potential adjustments going forward.

## **Be Prepared**

After some mindful reflection regarding the level of tension surrounding an issue, it can be beneficial to take a few moments to gather relevant information regarding the issue and vendor involved. Having this information ready and reviewed will help to focus the initial contact with the vendor about the issue.

It is courteous to have pulled together account numbers that can be sent with e-mails or provided over the phone. For issues that are ongoing, it is

useful to be able to reference previous or open support desk ticket numbers. A prepared summary or outline of the issue can be used as a reference to keep communications succinct and on point. For technology-related issues, keep in mind the specifics of your particular IT environment (e.g., operating system used, browsers impacted, versions of software installed, etc.).

It can also be important to explain the troubleshooting steps that have already been taken by the library. If an error message is appearing, take screenshots and be ready to send them if necessary. Noting the dates and times that issues started or are currently occurring can be helpful in tracking down the source of the problem. Finally, if the issue is with a specific database or software, consider having an access point (such as a generic proxied username/password) that will allow the support person to duplicate the issues occurring in your system.

## **Don't Let the Method Obscure the Message**

The means and methods used to communicate can impact the resulting quality and timing of responses. If a vendor prefers that access issues be submitted via an online form connected to a ticketing system, it is a good idea to use the form to get the problem into their service queue as soon as possible. In many instances, the ticketing systems have been set up to route the incoming requests directly to the

appropriate personnel, resulting in faster response times. Depending on the severity or pervasiveness of the issue, a call can also be made to established vendor representatives to inform them of the situation and to let them know that a ticket has been generated. The vendor representative can then effectively work on the library's behalf to ensure that the ticket is being adequately addressed.

While well-thought communication delivered through an appropriate channel can achieve positive results, the complete opposite can occur when ill-considered messages are being directed through ineffective routes. To this end, both sides can find ways to guide each other to the preferred method of communication.

Gently delivered hints like "we'll also need to set up a ticket for this issue" or "my outgoing voice message should have directed you to my assistant's e-mail account" can serve as a subtle reminder to reconsider the communication avenue being used. Both sides just need to be a bit aware and willing to adapt to take advantage of preferred communication channels. Internally, it is advisable that libraries save and maintain contact information, including preferred methods for reaching out to technical support. This information should be stored in a central location that is accessible to appropriate individuals, for instance within an ERM system.

## Long Story Short . . .

Be succinct and provide the necessary facts—not all the facts, but just the ones that are pertinent to the situation. Read the following paragraph and try to determine the issue:

Hi! We have several of your e-books. I love the Bluefire reader but really wish we could also use the Overdrive app. Then again, we also get Amazon eBooks and those can often only be used on the Kindle, which makes it really hard on our patrons because they don't know what reader to use when they get a book. I had to spend TWO HOURS with a patron trying to help him understand how to get the Acrobat thing and register, then get the app, and then the book wasn't even available to hold. We tried to download Twelve Angry Librarians by Miranda James. It is such a great book! It's a cozy murder mystery set at a small library convention. I bought the hardback because I just love Miranda. Well, it is actually Dean James who writes them but he

uses the pseudonym because how hard would it be to find his books with his real name of "Dean James"? I mean, it is a great name but what were his parents thinking? You can get it in Overdrive or use Bluefire, which is really nice because you get a choice. He writes another series too, with two little old ladies from Mississippi. I can't remember the name of that series, but it is also really good. I don't know if they are available in e-book format, and I think the patrons would also love them. So, can you help?

What is the problem? How can you tell from the burst of information provided? Instead of the above, what about:

Hi! I'm Jane Smith from Acme University, account J33T7. We are unable to place holds on our e-books. If you will go to our site [website] and use the credentials [username/password], then select a book that is checked out, for example Twelve Angry Librarians by Miranda James, and click "place hold," you will encounter the error message "No Holds allowed." I have checked our Admin and "allow holds" is checked. What other details do you need to help resolve this?

Providing information following the second example makes it easier to understand the issue. In this case, the e-books are not allowing a hold to be placed.

## Little Things Mean a Lot

The latest tools or online tutorials or webinars are not always required to improve communications. Individuals can achieve positive results by utilizing their current knowledge and existing technology simply by using the established tools in a more mindful way. For instance, if a picture is worth a thousand words, a screenshot of the problem might be substituted for lengthy paragraphs of explanatory text. The following few sections review some small changes that can have a significant impact on communicational effectiveness.

### Point 6

"Point 6" is not a very useful title for this section. The same can be said for e-mails with vague subject lines like "As you requested" or "Re: our call."

When crafting an e-mail, providing a short description in the subject line can allow for quick

identification and improved searching; for example, *“Acme University (Account [#]) — EDI Invoice [#] will not download.”* Additionally, this type of subject line provides information that the recipient can use to begin framing the issue at a glance.

When forwarding an e-mail to others or changing the subject of an existing correspondence, it is preferable to update the subject line. For example, *“Fund code changes (was EDI Invoice [#] will not download).”* Altering the subject line in this manner helps participants understand the evolving nature of the contents as well as the history of the conversation. It will also assist with locating this specific e-mail in future.

A caveat: When responding to a message from a ticketed support system, do NOT change the subject line. In a ticketed support system, the subject line is used by the program to link the case and to direct the e-mail to the correct support person.

### Highlight Important Aspects

Highlighting the important aspects of a message can greatly enhance communication, especially when lengthy explanations are required for complex issues. When communicating verbally, important points can be stated multiple times and summarized at the end of the conversation. For textual communications, visual cues like color, font size, boldface, and so on can be used to highlight important passages or call attention to nuances within the text. An example of an “all caps” highlight was used in the previous paragraph.

If a longer description is needed, it can be helpful to precede that description with a concise summary to bring focus to the narrative. Here is an example that can be used in the body of an e-mail:

Issue: Cannot access PDF full text in Database X

Details: Account [#]. When in Database X, we searched [topic]. Clicked on PDF Full Text link under article [list article and/or include screenshot]. Received error message “Access Denied” [insert screenshot]. This happens for each PDF Full Text Link within Database X. We have tried several browsers (i.e., Firefox, Safari, and Chrome). We are within IP range 10.0.0.0 to 10.255.255.255, but this happens also for anyone using our proxy access.

Constructing messages in this manner achieves positive results that are fairly easy to realize, but can simply be overlooked when trying to solve problems in a tense situation.

### Simple Tools Work

In the current age of constant technological developments, there are still instances when tried-and-true tools can seamlessly enhance communication without your needing to download a new computer application or learn how to use new software. For example, combining the keystrokes [alt] + [print screen] to copy an image of your screen can easily serve as a stand-in for more recent apps like snipit or Snipping Tool.

Software like Microsoft Paint (which is typically included in the standard software packages licensed to libraries and business) can be used to add clarifying details and descriptive text to screenshots. MS Excel (also typically included in the Office suite of software) has graphical capabilities that can be used to quickly translate numerical information into simple data visualizations like bar charts, line graphs, pie charts, and the like. Excel does not have the graphic capabilities available in visualization-focused software like Tableau, but in a pinch Excel can quickly illustrate a point.

### Multiple Methods Clarify the Message

When approaching a complex issue or when there is great urgency, it may be appropriate to communicate over several avenues simultaneously. For instance, you may want to draft an e-mail with screenshots before you call customer support. Once support is on the line and the problem is briefly described, support personnel can supply a direct e-mail address so that complex details can be exchanged and reviewed together in real time. Likewise, a call to support can include a request to access the library’s account while discussing the issue over the phone.

No matter what preparations are made and which steps are taken, there are times that the method of communication being used does not seem to be working effectively. In these cases, reconsider the means of communication. For example, if several e-mails back and forth do not appear to be achieving results, maybe a quick phone conversation can help clarify the issues and open paths to greater understanding.

## **“Need to Know”—How Do You Determine?**

It can be difficult to know exactly who should be included in communications concerning an issue. Who should be notified? How many people should be alerted? What is the best way to send the alerts?

One way to approach this question is to have a plan in place and share that plan. For example, for problems with database access, alerts may need to be sent to the public services team as well as a note posted on a public site. For invoice issues, the institution’s financial services team may need to be consulted. Be judicious and determine the best method for the needed notification well ahead of needing it.

## **Crowdsourcing for a Solution, Not for Your Frustration**

Posting a problem with a vendor on social media can get tons of attention, which can be a double-edged sword. The positive is, everyone sees it. The negative? Everyone sees it.

Be careful and consider using crowdsourcing as a last resort. It is a very effective avenue, but it does have consequences. Think it through. Don’t let the rant stand between you and a solution. Vendors, publishers, and all sorts of folks lurk on social media—even “private” lists have more lurkers than may be readily apparent.

Posting messages such as “does anyone have a good number for Vendor Z? I can’t get in touch and our product Y is not working” may quickly get the attention of Vendor Z, who jumps in to rectify the situation. This is great! You are now getting the help you need. However, there is also a strong likelihood that Vendors A to Y will also notice the post and begin calling with offers to move the library to their “more reliable” product.

The posting may also elicit a flurry of responses from well-meaning colleagues with advice, some good and some bad. This is not a negative result. It is just important to realize that all this messaging can focus more attention on the situation than is warranted and generate more work as responses will need to be sorted through and acknowledgments will have to be crafted and sent; all the while, the problem is still being resolved.

Additionally, the more often you do this, the more you are noticed. Posts are in the public sphere and colleagues will be reading these words. A hasty rant or clumsily worded request can cause negative results that were neither intended nor foreseen. Words to the wise when posting on social media are to be careful, considerate, and concise. If unsure about a potential post, consider waiting an hour or so and rereading it before hitting the send button. Also, having a co-worker review it before posting can help eliminate many missteps. Remember, the Internet is basically forever, and the repercussions of perceived slights can be difficult to overcome.

## **Not All Get to Be From Punxsutawney**

Each February 2 in Punxsutawney, PA, the townspeople gather to celebrate Groundhog Day, a Pennsylvania German custom of enlisting a groundhog to predict the timing of the coming spring. As mere humans, we do not typically possess the gift of perfect foresight. As a result, there are occasions when well-placed foreshadowing can be very useful. Discussing changes in advance can allow time for libraries and vendors to work together on responses to those changes. These conversations take the library-vendor relationship beyond the traditional buying/selling/troubleshooting and into the realm of preparation and planning.

For example, if cuts to the materials budget are expected in the coming year, a library may consider meeting with its vendors to discuss the potential impacts of this financial shortfall and review how these impacts might be mitigated. The library need not provide detailed information regarding the budget. General indications of financial expectations should be sufficient to start the conversation. Additionally, these discussions can serve as notice to vendors that they should consider altering their sales approach and revenue expectations while the financial situation persists.

Upcoming RFPs for products and services are another area that is ripe for early discussions. By getting together with potential respondents well before the RFP process is initiated, the library can both gather information about the current market and disseminate information about the expectations/requirements that are likely to be included in the RFP. The vendors can use these discussions both to deliver information about their products and to

gather data about the library's needs and preferences. These conversations should occur before the RFP is initiated. Once the RFP begins, all correspondence related to it should be conducted through official channels as set out by the institution or outlined in the RFP itself.

There are many areas that might benefit from advance consultation, including impending library projects, proposed research initiatives on campus, additional functional requirements, and so on. In all these cases, libraries and vendors should consider the potential benefits of planning together to achieve better outcomes or mitigate negative circumstances.

## **Wrap It Up**

In closing, the community comprised of librarians and vendors can be admired for its ability to work together in mutual support, even during stressful exchanges. A big part of maintaining this community is taking time to ensure that we are communicating effectively. Effective communication is not always that difficult to achieve if individuals remember to be calm, considerate, prepared, succinct, and flexible. Effective communication can often be achieved without purchasing new technology or having to learn new software. Effective communication can be accomplished through simple efforts that allow us to explore new ways of working together to resolve issues and improve services.